Centene Workbench: Contract Re-Certification Process

External Guide

Last Updated: EMT 07/07/2023

Purpose of this Document

With this guide, all brokers and agencies will be able to:

- Complete Contract Re-Certification in their Centene Workbench Portal.
- Steps will include verifying Demographic and Payment Information, Selling States, signing the 2024 Third-Party Marketing Entity (TPME) Agreement and W9.

  Please Note: *Licensed-Only Agents and Dual-Assignment Agents will not be prompted to update payment information.*
- Print Contract and W-9 documents once completed

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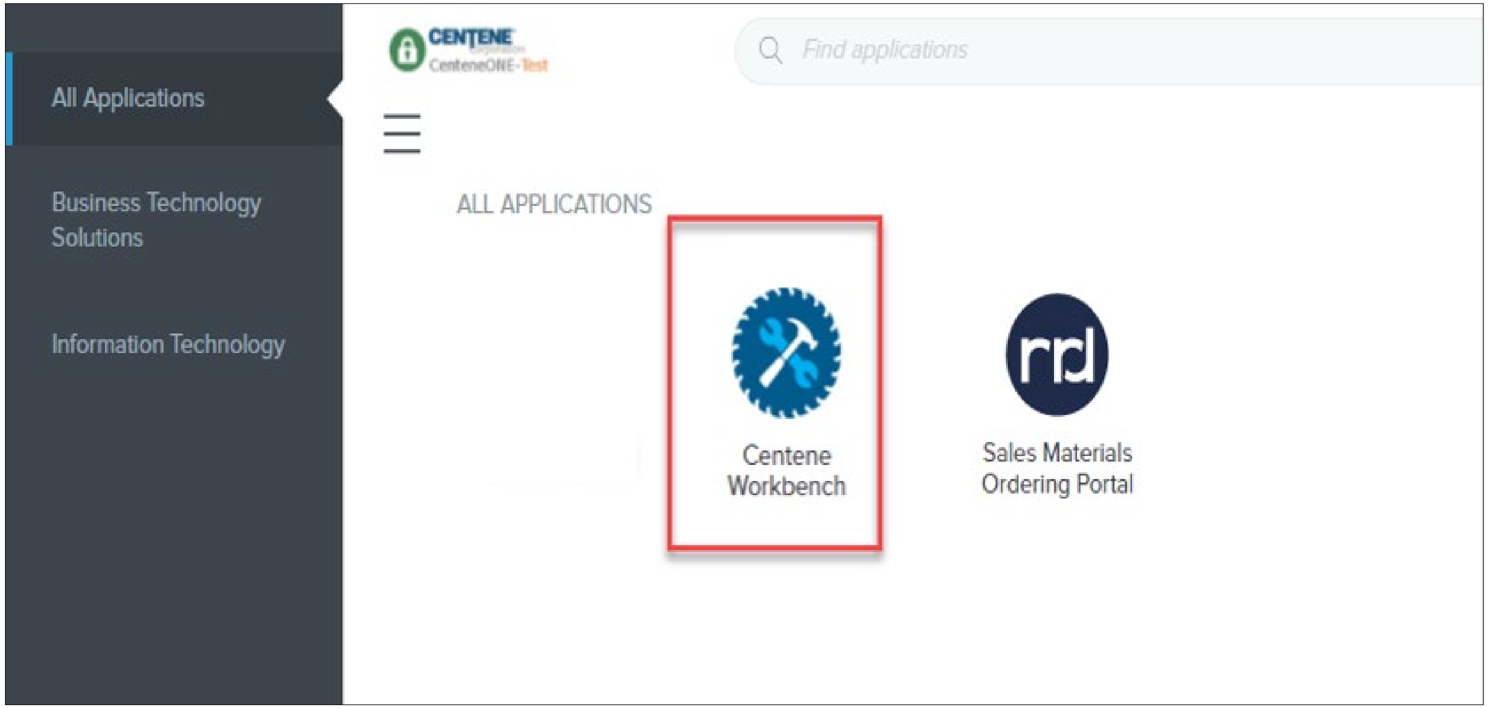
Logging into PingOne

Logging into PingOne

To access the Contract Re-Certification, please log into your Broker Portal, through your PingOne access in Centene Workbench.

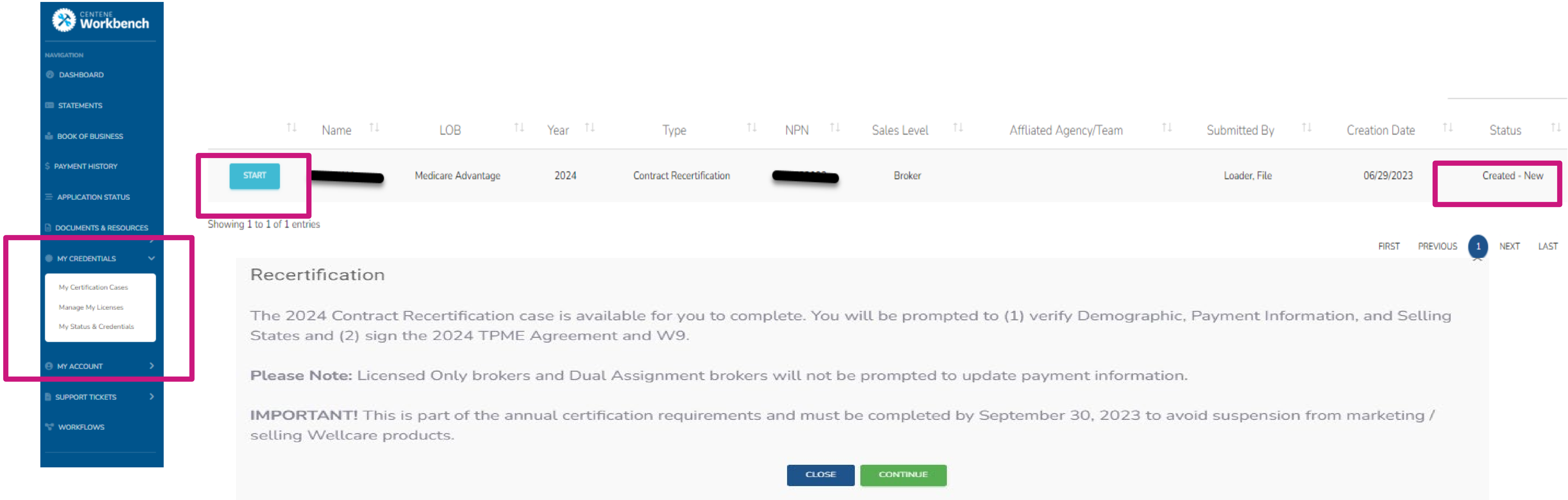
Note: For assistance with accessing PingOne, please follow the link to the PingOne Guide.



Verifying Notifications in Broker Portal

Accessing My Certification Cases from Navigation Menu

- Access the Contract Re-Certification by selecting from the Navigation Menu:
  - **My Credentials > My Certification Cases > Start**.



- You can view the status of the case on the right-hand side under **STATUS**.

Completing The Contract Re-Certification Case

Completing The Contract Re-Certification

1. Once logged into **Centene Workbench**, you will see the pending contract re-certification to complete.
2. Select **Start.**

	Name	LOB	Year	Type	NPN	Sales Level	Affliated Agency/Team	Submitted By	Creation Date	Status
START	[redacted]	Medicare Advantage	2024	Contract Recertification	[redacted]	Broker		Loader, File	06/29/2023	Created - New

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT LAST

Completing The Contract Re-Certification: Demographics

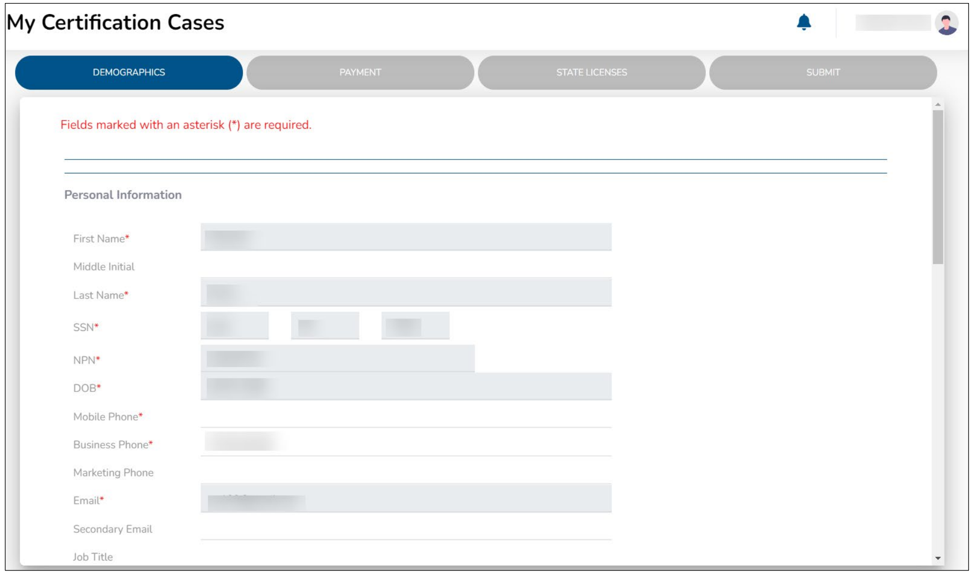
1. Select the **Demographics** tab under **My Certification Cases.**
2. Your Demographics information will automatically load in from your account profile.

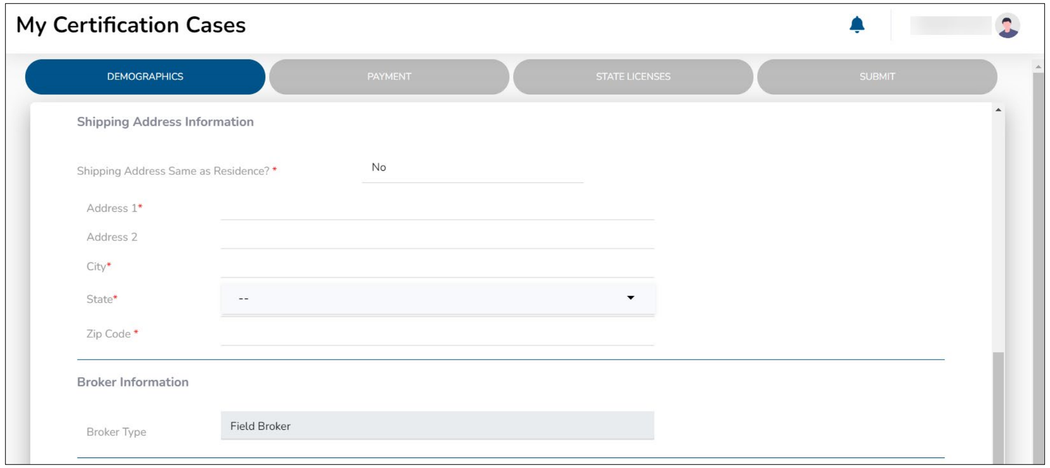
Note: Name, Tax ID, NPN, Email, Business Address information is pulled from NIPR and cannot be edited.

3. Ensure to review and/or update the following information in your Demographics:
   - **Mobile Number:** Required
   - **Business Number:** Required
   - **Marketing Number:** Optional
   - **Secondary Email:** Optional
   - **Shipping Address:** Required

Note: Please do not use a PO Box for Shipping Address.

4. Select continue to move on to the Payment section.

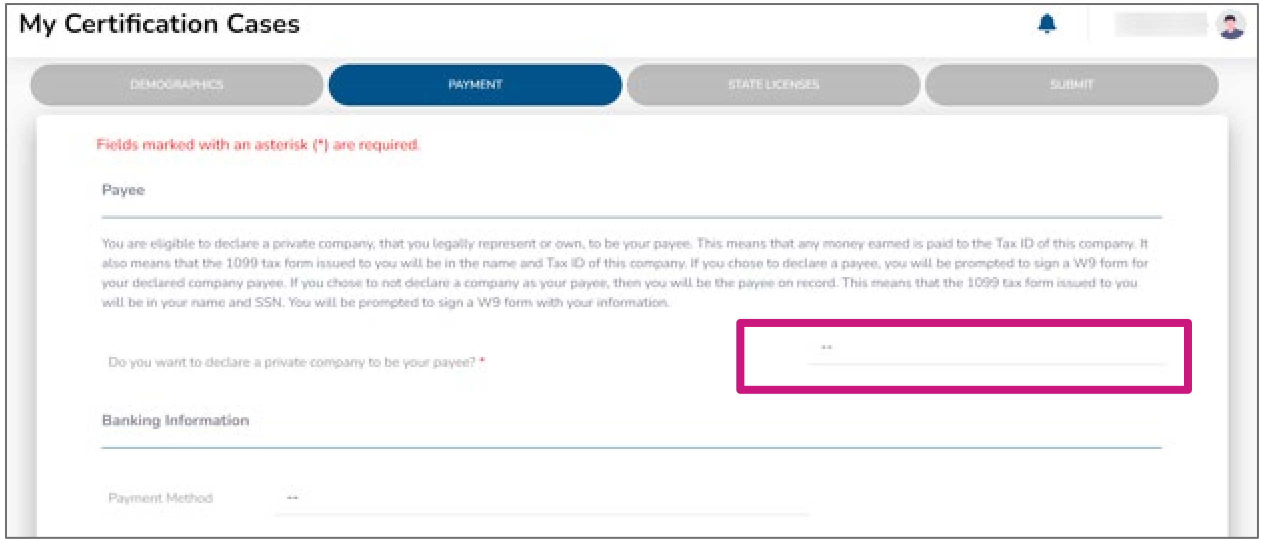




Completing The Contract Re-Certification: Payment

Direct and Downline Only Sub Type Payment Steps

1. Review your current payment information and update, as necessary.
   - Select **Yes** if you own an Agency and you wish to assign the Agency as the Payee.
   - Select **No** if you do not wish to declare the Agency as the Payee.



Note: Declaring the Agency as a payee is not the same as an Assignment of Commissions. If you wish to update your AOC, this needs to be changed in the “My Hierarchy Info” section in Centene Workbench. If Agency is assigned as Payee, be advised that you must be listed as an Authorized Owner on the bank account.

Completing The Contract Re-Certification : Payment

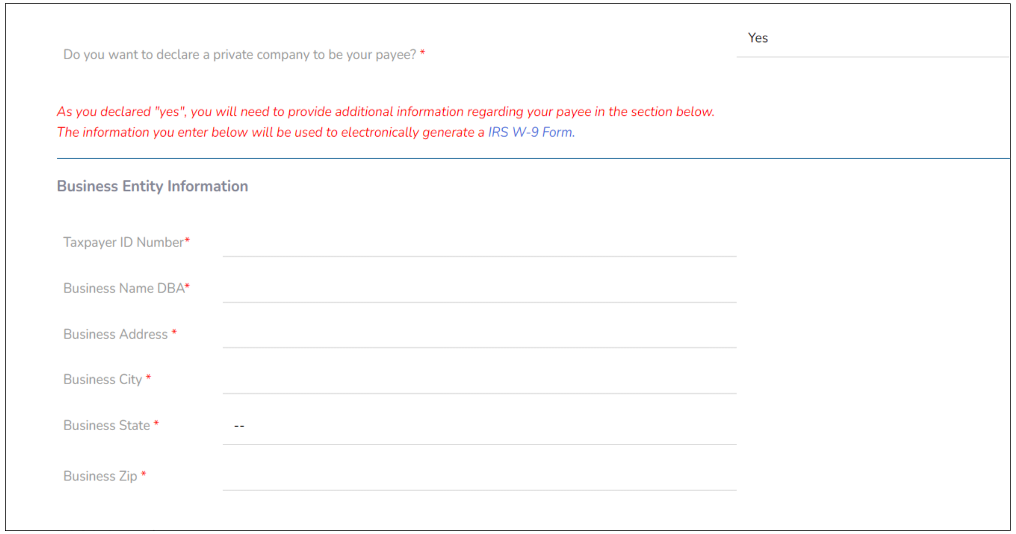
Direct and Downline Only Sub Type Payment Steps

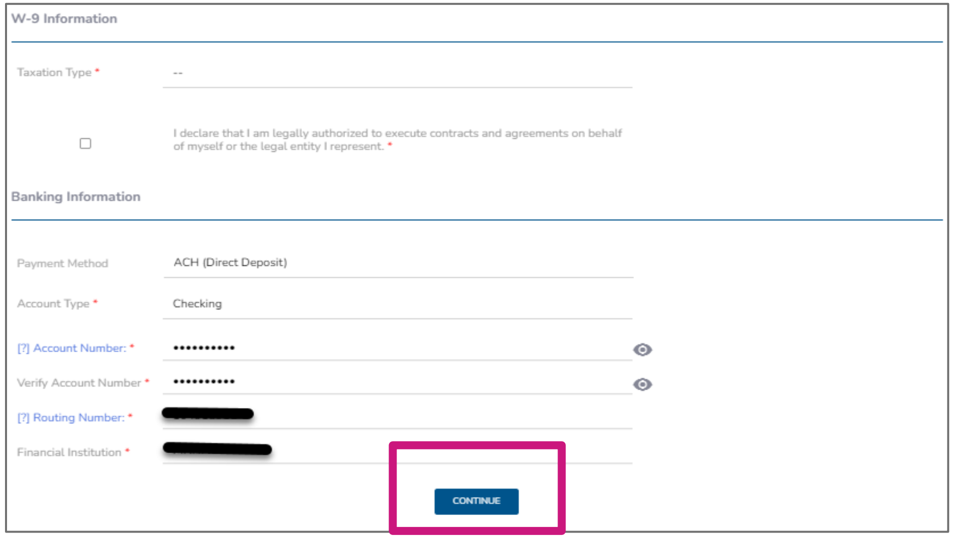
Payee Entity Assignment:

- If you selected **Yes**, provide the required payment information for this entity as well as a W9.

  Note: If you own an Agency and assign the Agency as your payee, your 1099 will be in the name of that entity.

- Once all information is provided, select **Continue.**



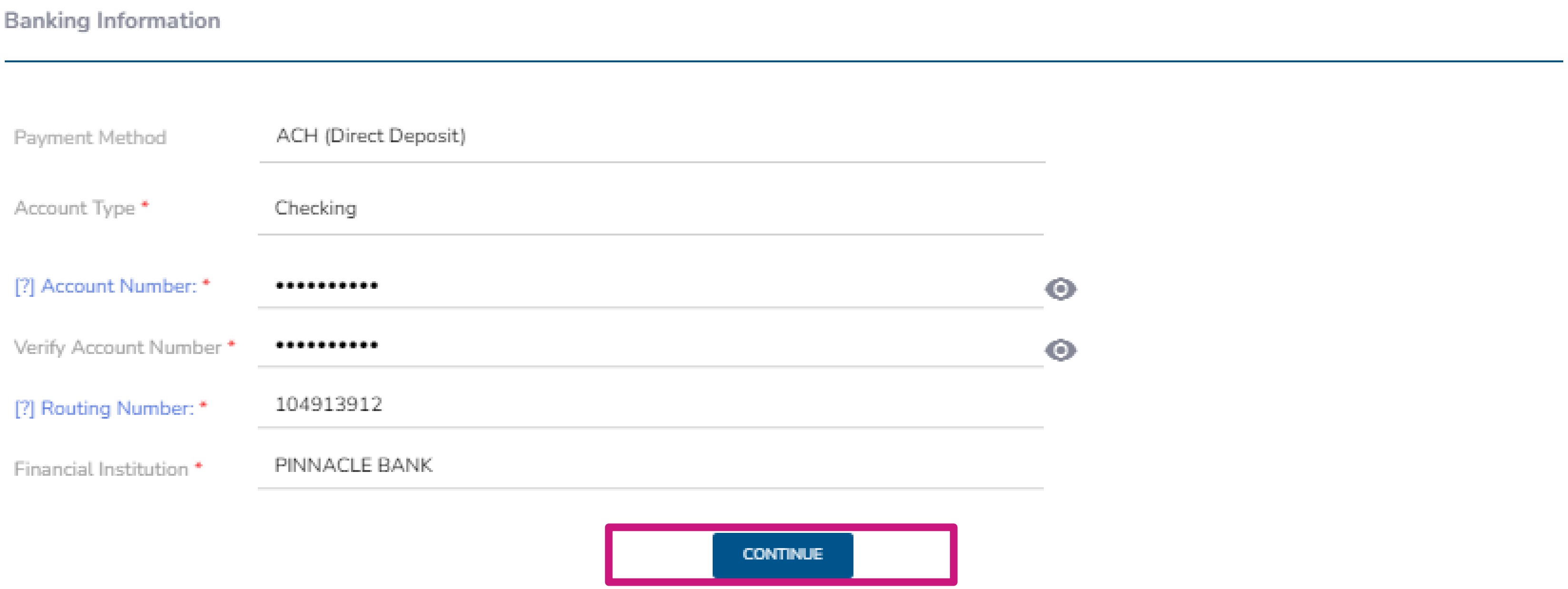


Completing The Contract Re-Certification : Payment

Direct and Downline Only Sub Type Payment Steps

No Payee Entity Assignment:

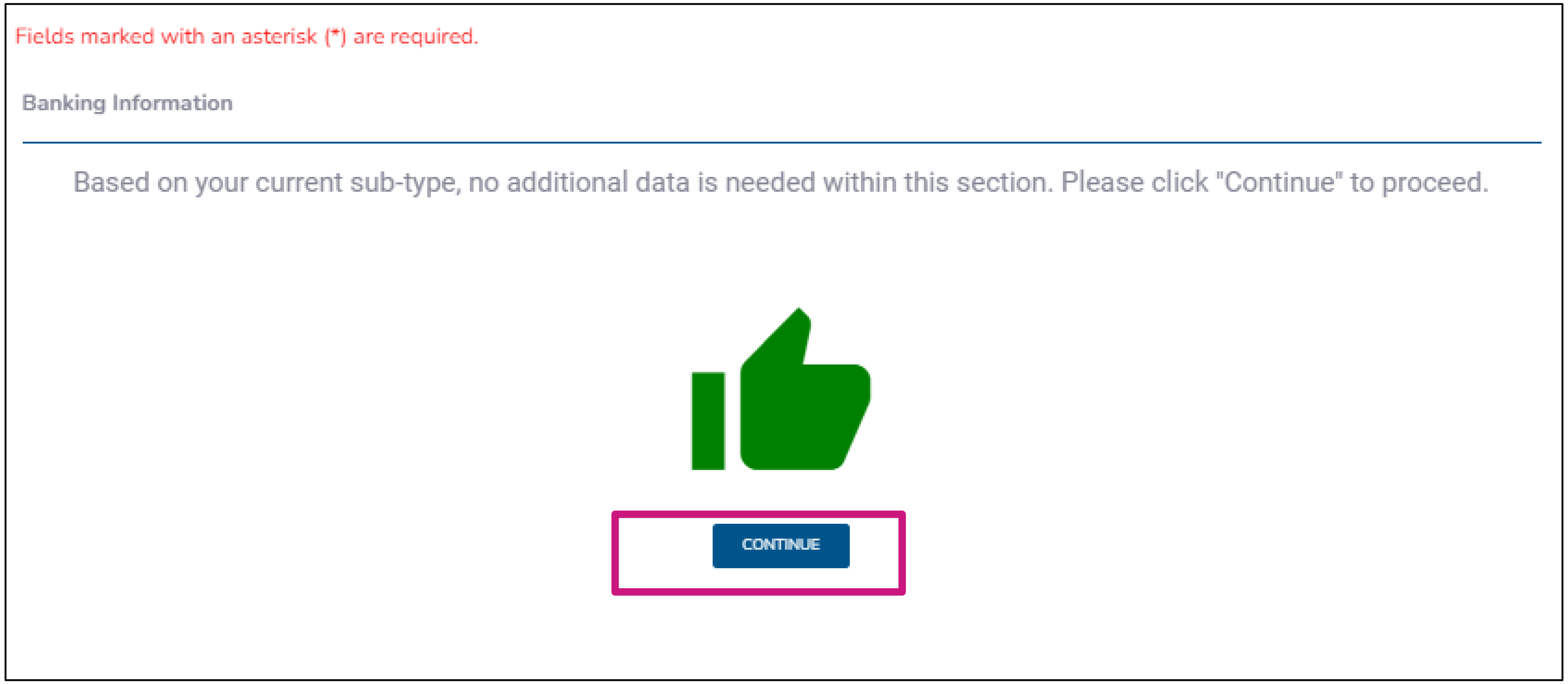
- If you selected **No**, provide the required payment information for yourself.
- Once all information is provided, select **Continue.**



Completing The Contract Re-Certification : Payment

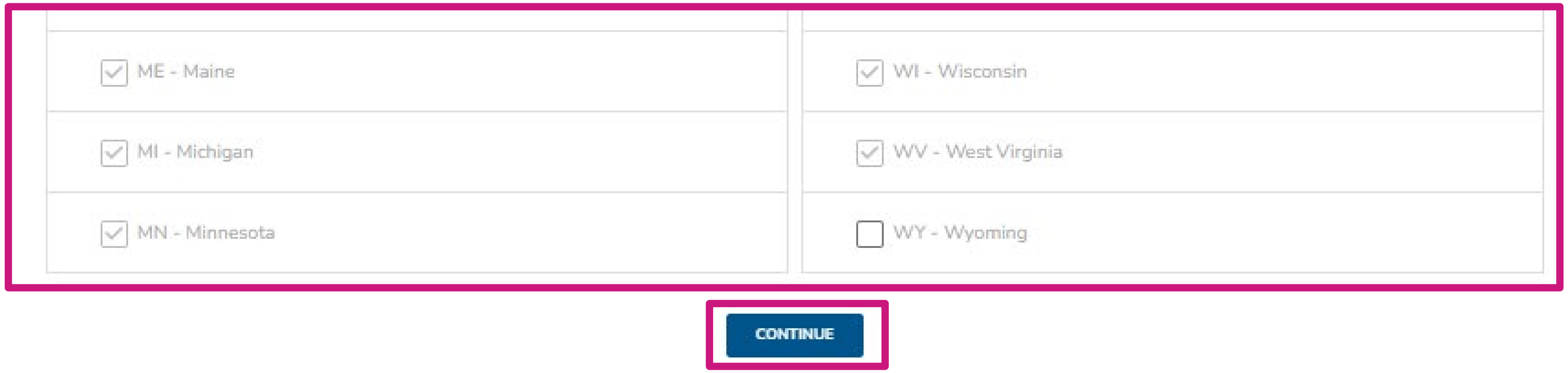
Licensed-Only Agent and Dual-Assignment Sub Type Payment Steps

- For the abovementioned Sub Types, commissions are assigned to the Upline, and no payment information is required.
- No actions are required during this step. Select **Continue.**



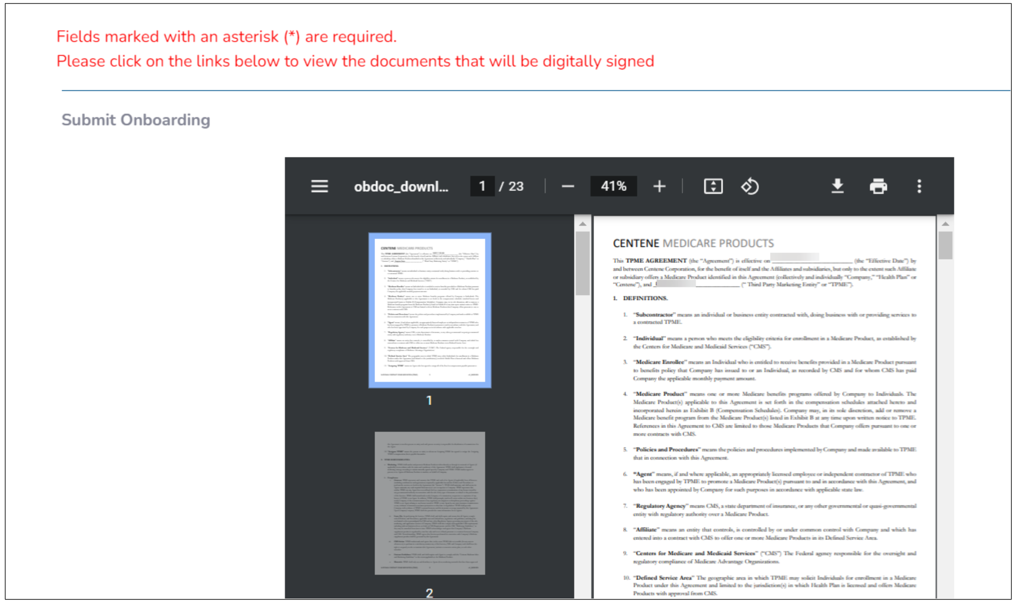
Completing The Contract Re-Certification : State Licenses

1. Review your current selected selling states.
2. You can also select additional licenses that you wish to market and sell Wellcare products for.
3. Once license section has been reviewed, select **Continue.**

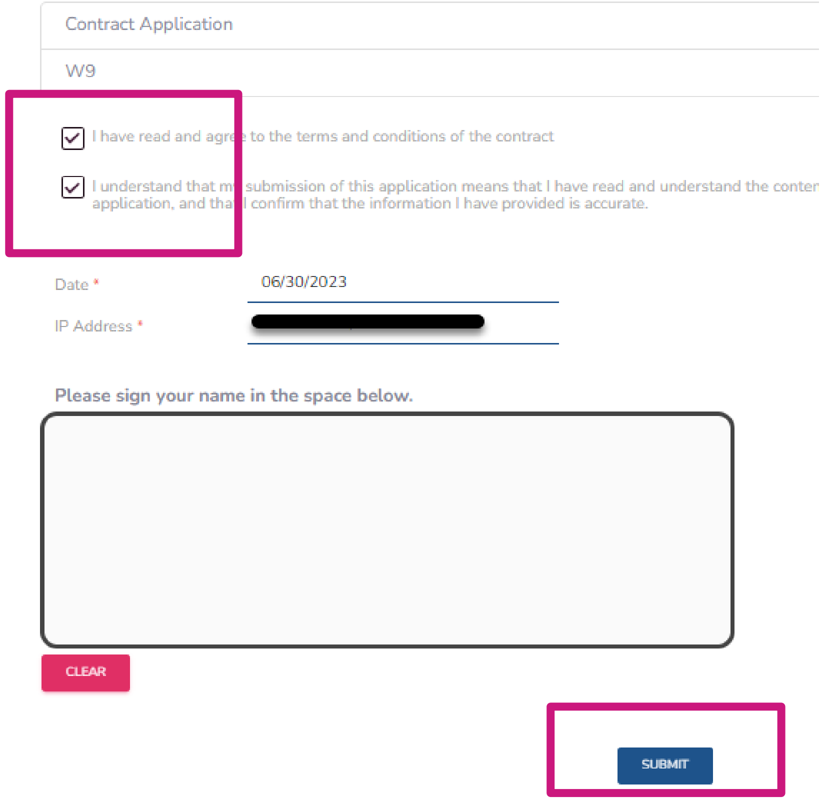


Completing The Contract Re-Certification: Submit

1. Prior to submitting this Contract-Recertification case, you will be able to review the 2024 Third-Party Marketing Entity (TPME) Medicare Agreement (including summary of changes) and your W9.



2. To submit your Contract Re-Certification case, review and acknowledge the statements below. Use the open space to complete your signature, and then select **Submit.**



Contract Re-Certification Completed

Contract Re-Certification Completed

Once you have successfully submitted your Contract Re-Certification case, you will receive the following message regarding next steps. You will also be given the ability to download the Third-Party Marketing Entity (TPME) Agreement and W9. (These documents are also located in the broker profile under the Documents & Resources tab.)

Note: If you are Re-Certifying as an Agency, please ensure your Principal completes the Contract Re-Certification process as well.

Submission Successful!

Thank you for completing your contract as part of the 2024 Annual Certification Requirement.

Below is a copy of your signed contract and W9. Please download and/or print a copy for your records. These document will also be stored in your portal under Documents & Resources - My Documents.

If you have not done so already, please ensure to complete the 2024 Annual Certification training prior to September 30, 2023 to ensure to avoid suspension from marketing and selling Wellcare products.

Download Contract

Download W-9

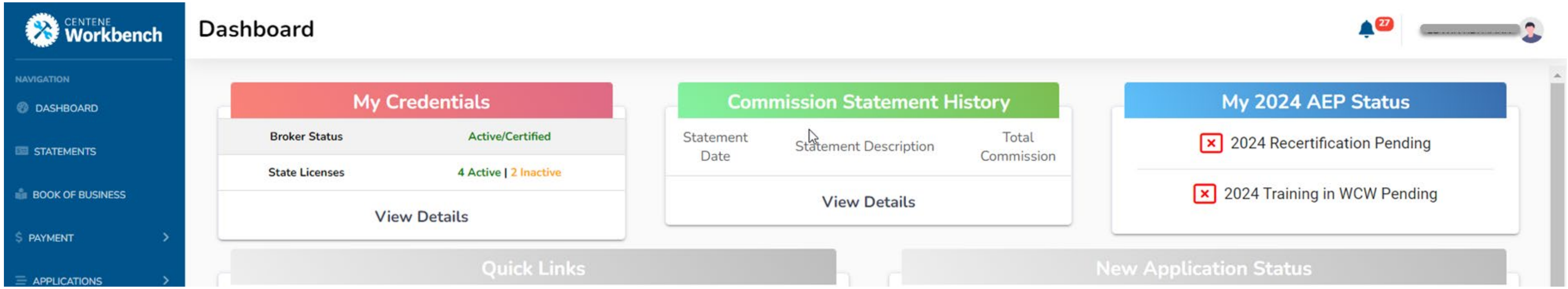
Broker Name	[redacted]
Email	[redacted]
NPN	[redacted]

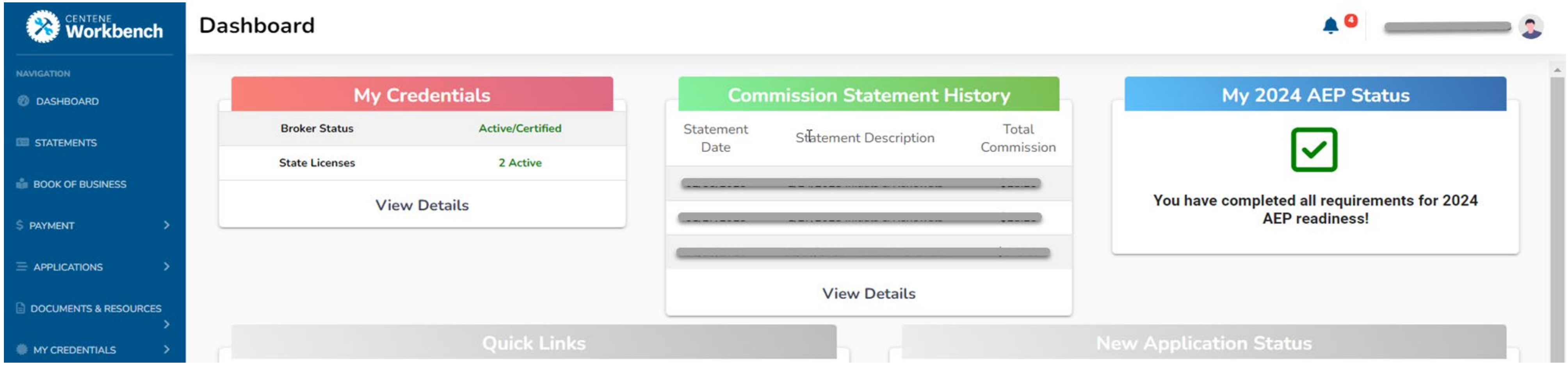
2024 NEW Profile Enhancement- Ready To Sell Widget

2024 NEW Profile Enhancement- Ready To Sell Widget

INDIVIDUAL BROKER VIEW

If you are viewing as a Broker without a direct reporting downline, the Ready To Sell Profile widget will give you a view of your current status, as well as display when you are fully Ready To Sell per the completed requirements.

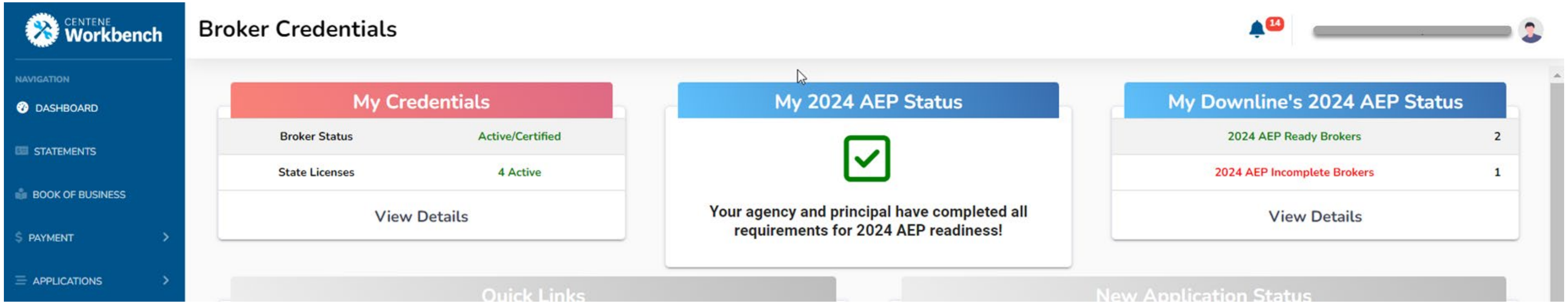


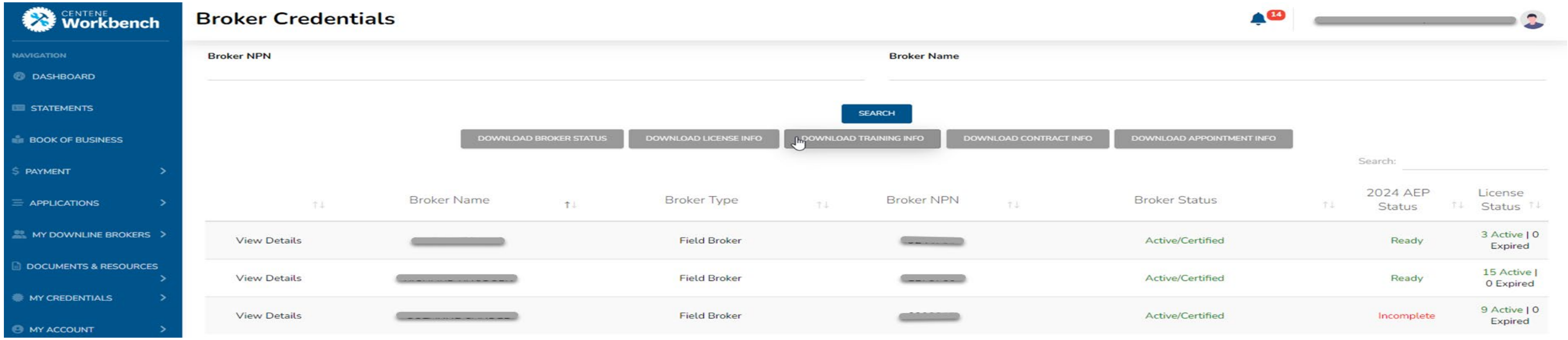


2024 NEW Profile Enhancement- Ready To Sell Widget

AGENCY VIEW

If you are viewing as an Agency, the Ready To Sell profile widget will give you a view of your downline so you are able to see everyone's Ready To Sell Status. To view the downline, click the "View Details" button located in the widget window.





Questions?